COLORADO
Healthcare & Economic Security
Staff Development Division

Entering a Medical Expense

CBMS | Process Manual | Revised: January 2022

OVERVIEW

This document provides a step-by-step process for how to enter a Medical Expense in CBMS.

PROCESS

1. Log into **CBMS**
2. Navigate to the Case by entering the Case Number in the **Global Search** bar on the Home Page
3. Click on Case Number in the results table to access the **Members** page
4. From the Members page, hover over the **Actions** button
5. Select **Begin Interactive Interview** to initiate the II queue
6. On the **Case Questions** page, be sure the 'Yes' radio button is selected for **Does anybody have expenses**
    a. Selecting 'No' will not populate the Expense page in the Interactive Interview (II) queue
7. Navigate to the **Expense** page
8. From the **Name** drop-down, select the person who has the Medical Expense
9. Click on the **Medical Expense** subtab
10. To add a new record, click the **plus (+)** sign in the blue detail header
11. Enter the **Effective Begin Date**
    a. Refer to **Online Help** for assistance with which date you should use

12. Enter the appropriate **Expense Type**
    a. If not provided and verification is required, select Medical
13. Select the appropriate **Frequency** from the drop-down
14. Enter **Provider Name**
    a. Although not mandatory, entering this information is helpful when there are many expenses of the same type reported
15. Enter the **Date of Service**
16. Select the appropriate **Verification** option from the drop-down menu
17. Select the appropriate **Source** option from the drop-down menu
18. Enter the **Date Reported**
19. Enter the **Date Verified**
20. Click **Save**
21. Navigate to the **Billing Related** List
    a. Billing Related List is required for SNAP expenses
22. Enter the **Effective Begin Date**
    a. Refer to **Online Help** for assistance with which date you should use
23. Enter the **Amount** of the expense
24. Enter the **Bill Date**
25. Select the appropriate **Verification** option from the drop-down menu
26. Select the appropriate **Source** option from the drop-down menu
27. Enter the **Date Reported**
28. Enter the **Date Verified**
29. Click **Save**

Repeat steps 10 - 29 for each separate reported expense type.

ACCESSIBILITY

This document is designed to comply with the Web Content Accessibility Guidelines (WCAG) 2.1 AA standard. If you experience any difficulty accessing the content or have questions regarding the process, please contact SOC_StaffDevelopment@state.co.us for assistance.